

**ABAG-MTC Joint Policy Committee**

October 22, 2004

9:00 a.m.

MetroCenter, Room 171

101 Eighth Street, Oakland

**AGENDA**

1. Welcome, Introductions and Opening Remarks
2. Approval of Joint Policy Committee Meeting Minutes of September 24, 2004 (attached) Action
3. Transit Oriented Development—Continued Discussion  
Following from discussion at the September 24<sup>th</sup> JPC, MTC staff and their consultant, Shelley Poticha, will talk about TOD lessons from other regions and preliminary findings from research in the Bay Area
4. Recent Housing Legislation Discussion  
Recently chaptered AB 2158 and AB 2348 amend the legislation governing general plan housing elements and regional housing needs determination. ABAG Principal Planner, Alex Amoroso, will report on the impact of the two bills with particular emphasis on the implications for regional planning and the pursuit of the regional vision.
5. Travel Forecasts Discussion  
At its last meeting, the Committee received a presentation on ABAG's Projections 2005. To help the JPC understand the implications of those projections (and of the underlying smart-growth vision) on regional travel behavior, MTC staff will talk about the forecasts generated by the regional transportation model. The attached table provides a summary.
6. A Smart Growth Checklist (attached) Action  
Item one in the initial JPC/Regional Planning work program calls for the initiation of a process for local confirmation of the regional vision and local implementation of a voluntary regional interest statement for major project review. The attached memo from the Regional Planning Program Director proposes a draft instrument for discussion with local planning

officials. This is intended to provide a starting point for this process.

7. SB 849

The Governor has signed into law a bill codifying the Joint Policy Committee. This has short-term implications for the Committee's membership and longer-term implications for work program and agency structure. It is appropriate to discuss the membership issues now. The attached memo from the Regional Planning Program Director refers.

Discussion

6. Other Business

7. Public Comment

## ITEM 2

### ABAG-MTC Joint Policy Committee

Minutes of the Meeting of September 24, 2004  
Held at 10:00 a.m. in MetroCenter Room 171

#### Attendance:

##### ABAG members:

Jane Brunner  
Mark Green  
Scott Haggerty (Chair)  
Rose Jacobs Gibson  
Steve Rabinowitsh

##### MTC members:

Sue Lempert  
John McLemore  
Shelia Young

##### MTC staff:

Betty Cecchini  
James Corless  
Valerie Knepper  
Therese McMillan

##### ABAG staff:

Alex Amoroso  
Patricia Jones  
Kenneth Moy  
Christy Riviere

##### JPC staff:

Ted Droettboom

##### Other:

Linda Craig, League of Women Voters  
Yvonne Koshland, League of Women Voters  
Peter Lydon, SPUR  
Andrew Michael, Bay Area Council  
Shelley Poticha, Center for Transit-Oriented Development  
Leslie Stewart, Bay Area Monitor

1. Welcome and Opening Remarks  
The chair opened the meeting with a welcome, and those in attendance introduced themselves.
2. Approval of Joint Policy Committee Meeting Minutes of June 18, 2004 and August 11, 2004  
The Minutes of the June 18, 2004 and August 11, 2004 meetings were approved.
3. Proposed Work Program for October, 2004 – March, 2005  
The proposed six-month work program was approved.
4. Proposed JPC Agenda for 2005-2006 Session of California Legislature  
The recommendations in the memorandum from the Regional Planning Program Director were approved. Committee members also suggested that staff try to pursue initiatives on fiscal reform and construction defect

litigation to the extent possible, noting that the Bay Area ought to take a leadership role.

5. Projections 2005

Paul Fassinger, ABAG Research Director, presented an overview of Projections 2005 and the monitoring of smart-growth initiatives relative to the projections. A copy of Mr. Fassinger's PowerPoint presentation is available on the JPC website ([abag.ca.gov/jointpolicy/meetings](http://abag.ca.gov/jointpolicy/meetings)).

Comments concentrated on the difficulty of defining and measuring smart-growth concepts and their implementation:

- Measuring jobs/housing balance as a simple ratio within local jurisdictions misses the fact that jobs in an adjacent jurisdiction may be closer than jobs within a resident's own jurisdiction;
- Housing near a work site may not be affordable to the people working at that site;
- The volatility of the job market may mean that someone starts out living close to their job, but later must find work in an entirely different part of the region while maintaining a stable residence;
- Telecommuting could have a profound influence on the importance of jobs/housing balance;
- Simple proximity may not be the best measure of a smart community; we may need to look at other factors like walkability;
- The age of general plans is an imperfect measure of their currency and relevancy; they can be amended and are written purposely to cover long periods.

Members also expressed a frustration that, in spite of tremendous efforts to change development patterns, commuting requirements may continue to worsen. MTC volunteered a presentation on travel forecasts to help better understand future transportation implications of the smart-growth projections.

The importance of monitoring relative to explicit objectives was emphasized. We need to know regularly whether we are getting any closer to where we want to be.

6. Transit Oriented Development

MTC Senior Planner, James Corless, presented a progress report on the regional initiatives to pursue supportive development in transit corridors

and at transit stations. A copy of Mr. Corless' PowerPoint presentation is available on the JPC website ([abag.ca.gov/jointpolicy/meetings](http://abag.ca.gov/jointpolicy/meetings)).

Committee members commented:

- Outreach is essential to persuade communities that TOD is the right thing to do and that the impacts are positive and manageable. Their needs to be wide buy-in at all levels.
- The outreach effort needs to occur through and involve a number of partners, including County CMAs, sub-regional coalitions of counties, conferences of mayors, local League of Cities chapters, transit providers, and local elected officials generally.
- New local elected officials need to be oriented to the concept and its benefits.
- Good examples and good statistics are required, particularly to demonstrate that higher density, transit-oriented development does not produce unacceptable traffic impacts.
- Planning needs to occur among multiple jurisdictions, impacts and implications extend beyond the boundaries of single municipalities.
- In addition to pursuing infill in existing corridors, we need to plan to prevent preemptive land uses along future alignments, i.e., uses which prevent supportive development in the future.
- Transit-oriented development needs to emphasize a diversity of land uses so that complete communities, not just dense residential enclaves, are created. Good design is also required to overcome preconceptions that density is evil.
- Regional monitoring will be required to assess how well local governments are delivering transit-supportive development.

## 7. Legislative Update

It was noted that legislation amending the housing needs determination process and the General Plan Housing Element requirement was signed into law the day before. Staff will report back on the implications of this legislation.

8. Public Comment

All public comment occurred within the context of specific agenda items and is summarized within the discussion of those items.

9. Other Business

There was none.

## ITEM 4

**Date:** October 22, 2004

**To:** Joint Planning Committee

**From:** Alex Amoroso, Principal Planner ABAG

**Re:** Smart Growth Implications of Recent Housing Law Changes

### Introduction

During the most recent legislative session, two housing bills were signed into law and affect the Regional Housing Needs Allocation Process (RHNA). These two bills (AB2158, Lowenthal and AB2348, Mullin) represented in law as Chapters 696 and 724 respectively, have implications not only to the Housing Element process, but also to the smart growth implications of State policy. The two pieces of law were arrived at through a process developed by the Department of Housing and Community Development (HCD). The Housing Element Working Group (HEWG) was created and served as a technical advisory group to HCD and the staff of the Legislature. Members of the HEWG included representatives from the California League of Cities, California State Association of Counties, several housing advocacy groups, both for- and non-profit developers, building associations and councils of governments. The HEWG worked for approximately six months to craft legislative language that strengthened and clarified Housing Element Law and reflects a number of trade-offs between the involved parties.

The two bill packet was moved through the legislative process and into law as a joint piece of work. Both pieces were necessary to carry out the intent of the HEWG and legislators who carried the bills.

This report highlights changes in the law and suggests what opportunities might result from their implementation. While not an exhaustive analysis of the new laws, the report does highlight the areas that the JPC and others could focus their attention. The new laws are reviewed in the context of their smart growth implications.

### Bill Highlights

#### AB2158, Lowenthal

1. A set of four objectives has been added that suggests the RHNA process should:
  - promote increasing the supply of housing equitably throughout the region and with each jurisdiction receiving a share of low and very low income units
  - promote infill development and socioeconomic equity, protect agricultural and environmental resources, and encourage efficient development patterns
  - promote an improved intraregional relationship between jobs and housing
  - redistribute the proportionate shares of lower income households away from those jurisdictions that have a disproportionately high share

This addition of intent language couches the RHNA process in the broader planning process of local jurisdictions (general plans) and implies a shift in the patterns of development to both accommodate more housing and preserve resources. These concepts are addressed in the RHNA requirements for allocation by the COG and through allowances for redistribution of units between jurisdictions.

2. The regional allocation from HCD to the COG will now be more closely tied to the overall projections of growth used in the Regional Transportation Plan (RTP). In the Bay Area, ABAG's Projections are used to prepare the RTP. If the State's RHNA allocation and the regional RTP projections are within three percent, then the regional projections will be the basis. A process has been instituted that will allow for dialogue between HCD, the COG and the Department of Finance, hopefully resulting in resolution of differences in excess of the three percent marker.

This allows for a greater focus on the region's assumptions about overall growth, assuming it is in the ballpark of the State's assumptions.

3. Cities and a county or counties may form a subregional entity within which RHNA numbers may be allocated through a mutually agreed upon process. The timing and process for the subregional allocations is spelled out in the law. The COG is still responsible to provide an overall allocation to the subregion, however the actual authority, within the context of the law, is placed with the subregional group for making the distribution. This process can now begin prior to the distribution of RHNA allocations. In addition, this portion of law is more clearly defined as a result of the changes.

Such an allowance for subregional delegation/responsibility allows for a more localized approach to land use decisions and housing need that can better respect local and subregional needs.

4. The set of factors that must be considered in the allocation process undertaken by the COGs has been modified. The revised list includes:

- jobs/housing relationships
- infrastructure capacity limitation outside the control of local authority
- availability of land including underutilized and underdeveloped land that might increase capacity for housing
- lands preserved or protected under state or federal laws
- county controls over development of agricultural lands
- RTP assessments of growth and focus of transit and transportation infrastructure.

These factors can be weighted by the COG to define their level of importance to a given region. The COG is required to use the factors to the extent that sufficient data is available at a regional level. The factors, survey for information and weighting give regions and local jurisdictions a way to address local constraints as well as reflecting state goals.

#### AB2348, Mullin

1. The sites analysis portion of the Housing Element Law has been amended. These new requirements are meant to provide more clarity and surety in the consideration of sites and programs available to develop housing during the Housing Element cycle.

2. Local jurisdictions may substitute up to 25% of their RHNA allocation with committed assistance units (rehab, purchases of subsidized units) rather than new construction. This encourages existing units to be preserved and should help jurisdictions with limited availability of land and sites.

3. Those jurisdictions that are unable to, or choose not to identify sufficient sites to accommodate their RHNA will then be required to address minimum densities in the housing

element update. These minimum densities have been identified in the legislation and in terms of unincorporated, suburban, non metropolitan and metropolitan subsets.

4. Projects that are consistent with the adopted housing element (provision of housing on an identified site) may be inconsistent with the general plan and/or zoning ordinance. If this occurs, it does not preclude the local jurisdiction from approving the proposed development.

5. A set of findings allow local jurisdictions to find against a development that meets current general plan and zoning ordinances under certain conditions. However, the findings requirements are stringent.

6. Imposition of development standards that render a site, already identified for housing, as not available for development at the proposed density of the general plan would not be allowed.

These pieces, in conjunction with the prior legislation, show a pattern of providing certainty to the development community. In another sense, they provide back up to the local jurisdiction board or council to approve development with the back up of state law.

## **Conclusion**

The two new laws have implications to smart growth including:

- Intent language that couches the RHNA process in the need to preserve and protect resources, link housing production to jobs and transportation availability, and promote infill development patterns
- Provisions that can limit the development of housing in unincorporated areas are not appropriate for development.
- Clear factors for consideration in the methodology that reflect capacity and habitat preservation issues
- Allowance for the subregional reallocation of units to better reflect identified needs in a multi-jurisdictional area
- Greater certainty in identifying sites and approving development of infill housing, with back-up of state law to defend the approvals.

Note: Because these laws mandate new work on both the regional governments and local governments, the laws are considered to be State mandates. Conversations are happening in Sacramento regarding how these new mandates might be funded.

## ITEM 5

### Compare Demographic & Travel Forecasts Based on ABAG's Projections 2002 and 2003

|   | Base Year<br>2000 | Proj2002<br>2025 | Proj2003<br>2025 | Proj2003<br>2030 | Pct. Diff.<br>P03 vs P02 |
|---|-------------------|------------------|------------------|------------------|--------------------------|
| <b><i>Socio-Economic Characteristics</i></b>    |                   |                  |                  |                  |                          |
| Total Population                                | 6,783,762         | 8,223,739        | 8,457,866        | 8,780,317        | 2.8%                     |
| Total Households                                | 2,466,015         | 2,977,987        | 3,065,412        | 3,186,592        | 2.9%                     |
| Household Population                            | 6,640,975         | 8,068,652        | 8,302,712        | 8,625,166        | 2.9%                     |
| Average Household Size                          | 2.69              | 2.71             | 2.71             | 2.71             | 0.0%                     |
| Employed Residents                              | 3,605,674         | 4,635,093        | 4,790,530        | 4,983,229        | 3.4%                     |
| Average Workers per Household                   | 1.46              | 1.56             | 1.56             | 1.56             | 0.4%                     |
| Total Employment                                | 3,753,709         | 4,932,591        | 4,982,813        | 5,226,319        | 1.0%                     |
| Mean Household Income                           | \$64,915          | \$82,384         | \$79,372         | \$83,302         | -3.7%                    |
| <b><i>Vehicle Ownership Characteristics</i></b> |                   |                  |                  |                  |                          |
| Zero-Vehicle Households                         | 247,232           | 248,886          | 291,206          | 311,369          | 17.0%                    |
| Single-Vehicle Households                       | 816,238           | 872,688          | 926,188          | 967,177          | 6.1%                     |
| Multi-Vehicle Households                        | 1,402,545         | 1,856,413        | 1,848,018        | 1,908,046        | -0.5%                    |
| Total Households                                | 2,466,015         | 2,977,987        | 3,065,412        | 3,186,592        | 2.9%                     |
| Total Vehicles in Households                    | 4,324,985         | 5,523,290        | 5,555,145        | 5,746,689        | 0.6%                     |
| Average Vehicles in Households                  | 1.75              | 1.85             | 1.81             | 1.80             | -2.3%                    |
| Share, Zero-Vehicle Households                  | 10.0%             | 8.4%             | 9.5%             | 9.8%             | 13.7%                    |
| Share, Single-Vehicle Households                | 33.1%             | 29.3%            | 30.2%            | 30.4%            | 3.1%                     |
| Share, Multi-Vehicle Households                 | 56.9%             | 62.3%            | 60.3%            | 59.9%            | -3.3%                    |
| <b><i>Travel Characteristics</i></b>            |                   |                  |                  |                  |                          |
| Transit Share for Work Trips                    | 10.9%             | 11.3%            | 12.0%            | 12.2%            | 6.2%                     |
| Carpool Share for Work Trips                    | 13.6%             | 14.5%            | 14.5%            | 14.6%            | 0.0%                     |
| Drive Alone Share for Work Trips                | 71.0%             | 70.0%            | 69.0%            | 68.6%            | -1.4%                    |
| Bicycle Share for Work Trips                    | 1.1%              | 1.2%             | 1.3%             | 1.4%             | 8.3%                     |
| Walk Share for Work Trips                       | 3.3%              | 3.0%             | 3.2%             | 3.3%             | 6.7%                     |
| Total Transit Trips                             | 1,175,555         | 1,529,452        | 1,642,829        | 1,742,605        | 7.4%                     |
| Total Auto-Person Trips                         | 17,597,259        | 22,601,018       | 22,729,823       | 23,706,534       | 0.6%                     |
| Total Bicycle Trips                             | 310,589           | 370,932          | 386,705          | 404,273          | 4.3%                     |
| Total Walk Trips                                | 1,950,422         | 2,419,891        | 2,518,123        | 2,639,438        | 4.1%                     |
| Total Trips, All Trip Purposes                  | 21,033,825        | 26,921,293       | 27,277,480       | 28,492,850       | 1.3%                     |
| Transit Share, All Trip Purposes                | 5.6%              | 5.7%             | 6.0%             | 6.1%             | 6.0%                     |
| Auto Share, All Trip Purposes                   | 83.7%             | 84.0%            | 83.3%            | 83.2%            | -0.7%                    |
| Bicycle Share, All Trip Purposes                | 1.5%              | 1.4%             | 1.4%             | 1.4%             | 2.9%                     |
| Walk Share, All Trip Purposes                   | 9.3%              | 9.0%             | 9.2%             | 9.3%             | 2.7%                     |



## Joint Policy Committee / Regional Planning Program

### ITEM 6

Date: October 4, 2004

To: Joint Policy Committee

From: Regional Planning Program Director

Subject: A Smart Growth Checklist for Testing Development Projects Against Bay Area Livability Objectives

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The first objective in the current JPC Regional Planning work program is to:

Initiate a process for local confirmation of the regional vision (Smart Growth Strategy/Regional Livability Footprint Project) and local implementation of a voluntary regional interest statement for major project review.

In pursuit of that objective I have talked to the Chair of the Bay Area Planning Directors Association (BAPDA) and will be meeting with the steering committee of that organization to explore a process for involving local planning directors in the delivery of the regional planning message to local councils and boards, culminating in the local government confirmation of the regional vision and implementation of a review process which tests local projects against the vision.

In preparation for that meeting, I have prepared a draft Smart Growth Checklist (attached) that localities could voluntarily use to assess major development projects against the regional interest. It is, in effect, a multiple-choice regional interest statement. It is designed to be low effort but high impact. It eschews any pretext of technical sophistication or analytic rigor in favor of giving localities an easy tool for informally sizing up a project against regional smart-growth objectives. It is imperfect and imprecise, and one cannot use it to assign a letter grade or even a pass-fail; but it can be highly effective in assisting local governments and developers in asking and answering the simple question: "Can we do better?" Addressing that question may lead to immediate project improvements, particularly if it is confronted creatively at an early stage in the project planning process. Asked repeatedly, it may encourage long-term improvements in local planning and development policy and hence smarter growth overall.

I have had some discussion with my colleagues about also using the checklist to collect information about local development projects which could be fed into the regional smart growth monitoring program. After much thought, I have concluded that this would not be a good idea. If the checklist is used early in the project planning process, and if it is effective in actually prompting change, then the information collected at the time of responding will not be an accurate reflection of the project as actually approved and developed. While it might be useful to track a project as it changes in response to smart growth considerations and other local

planning requirements, this requires a consistency in project identifiers and in approval process steps which is just too difficult to achieve at this early stage in the development of the monitoring program. The structured mindset required to report accurate project data is also incompatible with the open attitude of exploration which would be more appropriate when employing the checklist. In the end, I believe it is better to confine the purpose of the checklist to simple and informal raising of consciousness. Data should be acquired through separate, more formal, more systematic and more reliable instruments. These are being designed under another work program item.

I suspect that changes will be required to the checklist as I discuss it with local planning officials. Some of these changes may be substantial. However, before entering into those discussions, I would like confirmation from the JPC that the qualities described in the checklist generally reflect the Committee's perception of the kind of supportive local development the region is trying to achieve through implementation of the regional vision.

I recommend:

- A. THAT the Joint Policy Committee approve the attached draft Smart Growth Checklist as an accurate representation and appropriate extension of regional growth policy;
- B. THAT the Joint Policy Committee authorize the Regional Planning Program Director to enter into a discussion with local planning officials on a process for voluntarily employing this checklist or something similar as part of the local project review process, following from local-government confirmation of the regional smart growth policies; and
- C. THAT before actually seeking local government confirmation of the regional smart growth policies and subsequent use of a voluntary checklist or similar device, the Regional Planning Program Director report back to the Joint Policy Committee on the final documents as modified in discussion with local planning officials.

## **A SMART-GROWTH CHECKLIST FOR TESTING DEVELOPMENT PROJECTS AGAINST BAY AREA LIVABILITY OBJECTIVES**

The San Francisco Bay Area contains nine counties and over one hundred cities. These local governments are responsible for formulating local land-use plans and for regulating land development consistent with those plans.

There are also a number of region-wide agencies in Bay Area. Two of these, the Association of Bay Area Governments (ABAG) and the Metropolitan Transportation Commission (MTC) have joined together in a Joint Policy Committee (JPC) to work toward the achievement of a collective vision for the entire Bay Area. That vision was developed through the Smart Growth Strategy/Regional Livability Footprint Project. The Project was done under the auspices of a multi-sector partnership—including representatives of government, private business and the voluntary sector—and involved the participation of thousands of citizens from throughout the region. The JPC intends to pursue the vision through influencing the strategic investment of regional funds, principally in transportation improvements, and through the voluntary cooperation of a number of partners, particularly local governments.

The core principle of the regional vision is smart growth. Smart growth is regional development that revitalizes central cities and older suburbs, supports and enhances public transit, promotes walking and bicycling, and preserves open spaces and agricultural lands. Smart growth seeks to revitalize the already-built environment and to ensure that new development occurs in the most efficient manner possible. It aims to create more livable communities with sufficient housing for the region's workforce. Smart growth attempts to minimize the impact of development on the environment and on scarce natural resources, and it tries to reduce the need for new and redundant public expenditures.

This checklist is to assist local governments in their contribution to achieving the Bay Area vision, promoting smart growth and building a more livable region. Without imposing prescriptive, inflexible and precise standards and without requiring an expensive and time-consuming analysis process, it provides a set of general qualities against which to test individual development proposals.

By going through the list, local governments may make a rudimentary assessment of how an individual project facilitates or frustrates the future which the entire Bay Area is pursuing. To the extent that there is discretion, this assessment may influence the development approvals process and help identify desirable project improvements. In the longer term, it may prompt amendments to general plans and zoning codes to encourage more regionally friendly projects. At minimum, it should provoke a productive discussion of the project and of the community's future in the context of the entire Bay Area.

## Regional Policy

The checklist is based on explicit regional policy. Both the ABAG and MTC Boards have formally adopted the Preamble and Policies quoted in the box below. These have also been adopted by the Bay Conservation and Development Commission (BCDC) and by the Bay Area Air Quality Management District (BAAQMD).

### Preamble

Current land-use patterns in the San Francisco Bay Area are putting intense pressure on the economic, environmental and social wellbeing of the Bay Area and of surrounding regions. The projected addition of over one million new residents and one million new jobs in the coming decades will further challenge our ability to sustain the high quality of life we enjoy today.

To help meet this challenge, the five regional agencies of the Bay Region—the Association of Bay Area Governments, Bay Area Air Quality Management District, Bay Conservation and Development Commission, Metropolitan Transportation Commission and the Regional Water Quality Control Board—along with the economy, environment and social equity caucuses of the Bay Area Alliance for Sustainable Communities, developed a set of Smart Growth policies.

The policies reflect the values articulated by workshop participants of the Smart Growth Strategy/Regional Livability Footprint Project and address Bay Area conditions. The policies are consistent with widely accepted notions of smart growth. They are meant to encourage meaningful participation from local governments, stakeholders and residents.

The policies provide a framework for decision-making on development patterns, housing, transportation, environment, infrastructure, governmental fiscal health and social equity that can lead us toward development of vibrant neighborhoods, preservation of open space, clean air and water, and enhanced mobility choices, while enhancing the Bay Area's relationship with surrounding regions.

### Policies

#### Jobs/Housing Balance and Match

Improve the jobs/housing linkages through the development of housing in proximity to jobs, and both in proximity to public transportation. Increase the supply of affordable housing and support efforts to match job income and housing affordability levels.

#### Housing and Displacement

Improve existing housing and develop sufficient new housing to provide for the housing needs of the Bay Area community. Support efforts to improve housing affordability and limit the displacement of existing residents and businesses.

***Preamble and Policies, continued...*****Social Justice and Equity**

Improve conditions in disadvantaged neighborhoods, ensure environmental justice, and increase access to jobs, housing, and public services for all residents in the region.

**Environmental, Natural Resource, Open Space and Agricultural Preservation**

Protect and enhance open space, agricultural lands, other valued lands, watersheds and ecosystems throughout the region. Promote development patterns that protect and improve air quality. Protect and enhance the San Francisco Bay and Estuary.

**Mobility, Livability and Transit Support**

Enhance community livability by promoting in-fill, transit oriented and walkable communities, and compact development as appropriate. Develop multi-family housing, mixed-use development, and alternative transportation to improve opportunities for all members of the community.

**Local and Regional Transportation Efficiencies**

Promote opportunities for transit use and alternative modes of transportation including improved rail, bus, high occupancy (HOV) systems, and ferry services as well as enhanced walking and biking. Increase connectivity between and strengthen alternative modes of transportation, including improved rail, bus, ride share and ferry services as well as walking and biking. Promote investments that adequately maintain the existing transportation system and improve the efficiency of transportation infrastructure.

**Infrastructure Investments**

Improve and maintain existing infrastructure and support future investments that promote smart growth, including water and land recycling, brownfield clean-up and re-use, multi-use and school facilities, smart building codes, retention of historic character and resources, and educational improvements.

**Local Government Fiscal Health**

Improve the fiscal health of local government by promoting stable and secure revenue sources, reduced service provision costs through smart growth targeted infrastructure improvement, and state and regional sponsored fiscal incentives. Support cooperative efforts among local jurisdictions to address housing and commercial development, infrastructure costs, and provision of services.

**Cooperation on Smart Growth Policies**

Encourage local governments, stakeholders and other constituents in the Bay Area to cooperate in supporting actions consistent with the adopted Smart Growth policies. Forge cooperative relationships with governments and stakeholders in surrounding regions to support actions that will lead to inter-regional Smart Growth benefits

## The Role of Development Projects

Smart growth is a simple concept but difficult to achieve. The attainment and maintenance of the qualities we all want for the Bay Area will require the concerted and coordinated effort of all levels of government and the cooperation of myriad participants in the private and voluntary sectors. Smart growth will not occur by just changing the characteristics of individual development projects. It will require hard choices about where we put our scarce transportation and infrastructure dollars, how we designate and protect open space and other key environmental assets, and what collective steps we take to ensure that all segments of the region's population, particularly our most vulnerable, benefit from growth.

Nevertheless, the character of the new development has a central role to play in maintaining the livability of the Bay Area. The location, composition, density and design of new development projects can have an immense cumulative impact on the Bay Area's ability to sustain a healthy economy and reasonable cost of living, to provide effective and inexpensive public services, to secure adequate choice and opportunity for present and future generations of residents, to protect our environment, and to ensure that we all continue to enjoy a high quality of life.

New development is supportive of the smart growth policies and helps pursue the region's livability objectives to the extent that it:

1. Reduces the need to travel long distances;
2. Facilitates transit and other non-automotive travel;
3. Increases the availability of affordable housing;
4. Uses land efficiently;
5. Helps protect natural assets;
6. Promotes social equity;
7. Employs existing infrastructure capacity;
8. Maintains and reinforces existing communities.

## The Checklist

The following checklist, organized around the above eight criteria, provides a ready, non-technical way of assessing a development project's contribution to smart growth and Bay Area livability objectives. In total, the checklist describes an *ideal*. It is highly unlikely that any one project will earn a check mark in every box—or even in most. Many of the items are not applicable to every project. However, systematically going through the list

will facilitate an informal evaluation of a project's performance relative to the shared vision for the region and help identify areas where improvement is desirable and possible. The checklist is not a substitute for the detailed technical analysis that may be required to measure a project's environmental impact or to assess conformity with community land-use objectives; but the list may supplement that technical analysis and help focus it on issues that are also of concern to the overall health of the entire Bay Area region.

### **1. Reduces the need to travel long distances**

- ☐ If a residential or mixed-use project, it creates housing units appropriate to and affordable for people working in the local community (i.e., it could decrease the requirement to import workers from outside the community).
- ☐ If a commercial, industrial or mixed-use project, it provides jobs which could be filled by people living in the local community (i.e., the jobs generally match the skill levels of the local labor force).
- ☐ If a residential or mixed-use project, it is within walking distance of or contains the stores and services that people typically require on an everyday basis (e.g., food or convenience store, dry cleaner, neighborhood school, childcare facility, recreation center).
- ☐ If a commercial, industrial or mixed-use project providing significant employment, it is within walking distance of or contains services and activities that fulfill everyday needs and provide respite from the work environment (e.g., restaurants, parks, recreation facilities, convenience retail).
- ☐ It provides housing opportunities within walking distance of an employment center or employment opportunities within walking distance of a substantial residential population.
- ☐ It mixes uses (any combination of housing, retail, office and services) or it adds to the diversity of uses within an existing area.

### **2. Facilitates transit and other non-automotive travel**

- ☐ It locates housing units or employment locations within walking distance of a rail transit station, bus stop, ferry terminal or other transit boarding point.
- ☐ It encourages easy, direct and safe pedestrian travel (i.e., it contains or connects directly to developed sidewalks or pedestrian paths, and it provides for the safe and convenient pedestrian crossing of thoroughfares, automobile entrances, and driveways).
- ☐ It makes provision for bicycle commuting (e.g., bike paths or lanes, bike racks and lockers, showers and changing rooms in commercial and industrial facilities).

- ☐ It is developed at densities appropriate to the existing or anticipated transit technology serving the project (These will vary by corridor and other specific situations, but generally accepted rules of thumb are: conventional bus at 7 to 15 residential units per acre, commuter rail or light rail at 10 to 25 units per acre—higher at stations, rapid transit such as BART at 25 to 75 residential units per acre or with commercial floor area ratios up to 10 in suburban centers and higher in downtowns).
- ☐ It provides pedestrian amenities that encourage walking (e.g., weather protection, sidewalk trees, lighting, trash receptacles and street furniture) and assist transit use (e.g., bus benches and shelters, informative signing).

### **3. Increases the availability of affordable housing**

- ☐ It enlarges the variety of housing types (single family, townhomes, and apartments), sizes (studio, 1BR, 2BR, 3BR, etc), tenures (fee simple, condominium and rental) and prices available, contributing to a more complete, inclusive and multi-generational community.
- ☐ It provides housing units affordable to households earning around the regional median household income or less.
- ☐ It contributes to meeting the community's statutory allocation of regional housing need, particularly for the very low, low and moderate income categories.

### **4. Uses land efficiently**

- ☐ It is developed at a density higher than but compatible with that prevailing in the surrounding community (i.e., it increases the housing or employment yield per unit of land but does not overwhelm infrastructure capacity or neighborhood character).
- ☐ It results in the infill and completion of an existing community rather than an expansion of the urbanized area or the creation of new separated and isolated areas of development.
- ☐ It creates integrated public open space which is not only decorative but also accessible and usable, providing a shared community amenity and a viable alternative to less and less affordable private space.
- ☐ It is developed in a manner which minimizes wasted, unused and unusable space (e.g., inaccessible and inhospitable setbacks and sideyards that reduce rather than enhance privacy; excessive pavement that does not materially increase vehicle capacity; redundant and poorly located surface parking that separates uses and discourages pedestrian access).

## 5. Helps protect natural assets

- ☐ It is developed within the established urbanized area without encroachment into greenbelt, particularly into critical environmental areas (e.g., prime watersheds, sensitive shorelines and wetlands, unbroken forest and grassland areas, critical wildlife habitat) or into prime agricultural land.
- ☐ It results in the clean up of a contaminated site (i.e., brownfield).
- ☐ It is designed to be energy efficient (e.g., it is exceptionally well-insulated, it uses low-energy lighting and appliances and natural lighting and ventilation when feasible; it employs environmentally friendly energy sources such as solar, geo-thermal or co-generation).
- ☐ It uses recycled or low-impact building materials.
- ☐ It is sited so as to protect existing mature trees.
- ☐ It helps conserve scarce water (e.g., it uses less water-demanding landscape materials or it uses recycled “gray” water for irrigation).
- ☐ It demonstrates responsible practices for storm-water management, pollution prevention, and minimization of storm-water runoff.
- ☐ It is located on land that is physically suitable for development (e.g., not on steep slopes greater than 15 percent, seismic fault lines and areas subject to extreme liquefaction, floodplains and stream beds).

## 6. Promotes social equity

- ☐ It minimizes displacement of existing lower-income residents or existing small, independent businesses and it provides affordable and suitable replacement units for those displaced.
- ☐ It provides employment opportunities suitable for and accessible to an existing population of unemployed or underemployed workers.
- ☐ It provides affordable space for needed community services (e.g., child care and child development, public recreation and education, health care).
- ☐ It preserves and improves or it adds low-income housing which blends seamlessly into the surrounding community and does not overly concentrate, isolate or stigmatize residents.

**7. Employs existing infrastructure capacity**

- ☐ It is located adjacent to existing infrastructure: roads, public transit, water, sewer.
- ☐ It attempts to use existing facilities in preference to new or additional facilities (e.g., fire, police, schools).
- ☐ It uses and helps maintain public facilities that would otherwise face downsizing or closure (e.g., schools left behind by demographic change).

**8. Maintains and reinforces existing communities**

- ☐ It helps complete an existing neighborhood by filling in a vacant or underutilized site or by adding missing neighborhood uses.
  - ☐ It reuses or rehabilitates existing and historic structures.
  - ☐ It employs an architectural style compatible with the dominant and desired character of the area.
  - ☐ It relates to the surrounding community and does not create an isolated enclave.
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## Joint Policy Committee / Regional Planning Program

### ITEM 7

Date: October 12, 2004

To: Joint Policy Committee

From: Regional Planning Program Director

Subject: Achieving Compliance with SB849

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This memo lists actions required to be in compliance with what is now state law governing the Joint Policy Committee. Excerpts from the bill are quoted in *italics*, followed by a brief staff comment.

*(h) Based on this history and collective involvement, and the interrelation between land use, transportation, and air quality, the Bay Area Air Quality Management District should be included as a represented agency on the joint policy committee by June 30, 2005. If the Bay Area Air Quality Management District has not been included by June 3, 2005, the Bay Area Air Quality Management District shall be included as a represented agency with an equal number of committee members.*

The JPC should begin discussing options for including representation from BAAQMD on the committee, noting that SB849 is silent on the total number of committee members. A larger committee will broaden representation but make in-depth, interactive discussion more difficult.

*66536.1. (a) The joint policy committee shall prepare a report analyzing the feasibility of consolidating functions separately performed by ABAG and MTC. The report shall be reviewed and approved by MTC and the ABAG executive board and submitted to the Legislature by January 1, 2006.*

The Executive Director of MTC, the new Executive Director of ABAG and the Regional Planning Program Director should present a proposal for meeting this requirement early in the New Year, if not earlier.

*The combined membership of the joint policy committee shall include at least one representative from each of the nine regional counties: Alameda, Contra Costa, Marin, Napa, Sonoma, San Mateo, San Francisco, Santa Clara, and Solano.*

There is presently no representation from Napa County. The Committee could remedy this situation simultaneously with inclusion of BAAQMD.

*(c) The joint policy committee shall coordinate the development and drafting of major planning documents prepared by ABAG, MTC, and the Bay Area Air Quality Management District,*

*including reviewing and commenting on major interim work products and the final draft comments prior to action by ABAG, MTC, and the Bay Area Air Quality Management District. These documents include, but are not limited to, the following:*

- (1) Beginning with the next plan update scheduled to be adopted in 2008, the regional transportation plan prepared by MTC and described in Section 66508 of the Government Code.*
- (2) The ABAG Housing Element planning process for regional housing needs pursuant to Article 10.6 (commencing with Section 65580) of Chapter 3 of Division 1 of Title 7.*
- (3) The Bay Area Air Quality Management District's Ozone Attainment Plan and Clean Air Plan.*

The JPC work program includes the oversight of major work related to the pursuit of the Smart Growth vision. Items 1 and 2 are encompassed within that existing work program. Item 3 can be added.

In his signing message for SB849, the Governor has requested legislation requiring representation from the Secretary of Business, Transportation and Housing. The JPC may want to consider inviting that representation, obviating the need for new legislation.